# ForwardHealth Provider Portal

# RA User Guide

**Date Last Updated: March 30, 2010**

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# 1 Accessing Remittance Advices on the ForwardHealth Portal

## 1.1 Access the Remittance Advices Page

To access the Remittance Advices (RA) page:

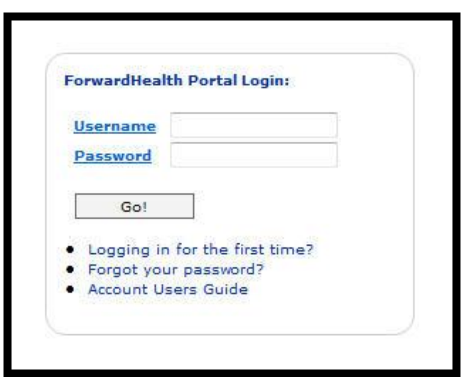
1. Access the ForwardHealth Portal at *www.forwardhealth.wi.gov.*

   The ForwardHealth Portal home page will be displayed.

2. Click **Login** at the top of window.


*ForwardHealth Portal Home Page*

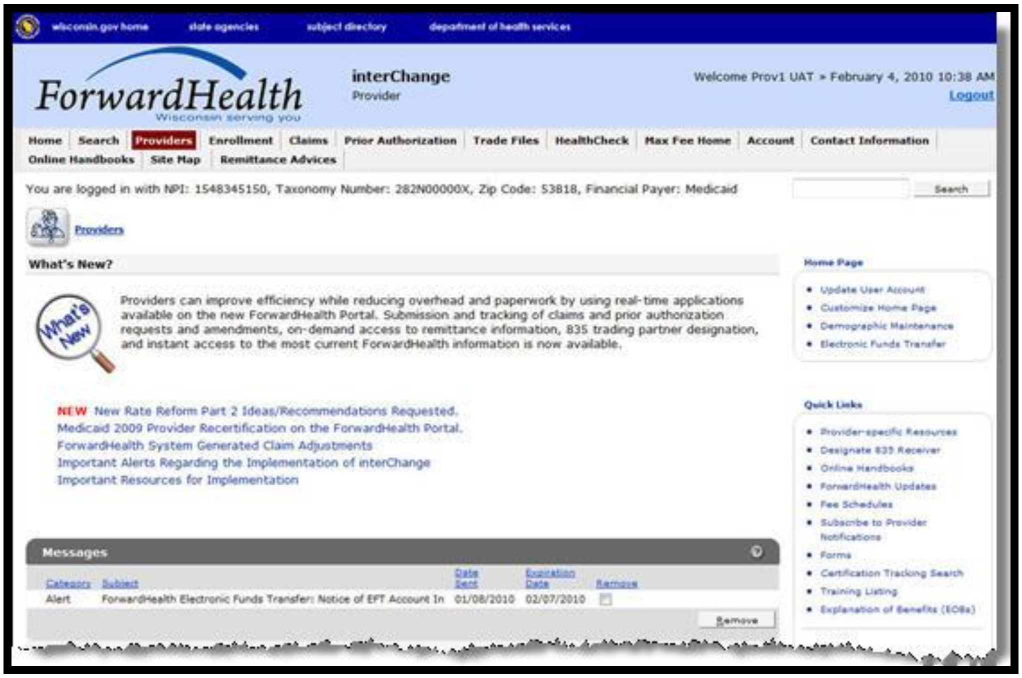
The ForwardHealth Portal login panel will be displayed.




*ForwardHealth Portal Login Panel*

3. Enter your user name and password to login to your secure provider Portal account.

   The secure Portal home page will be displayed.



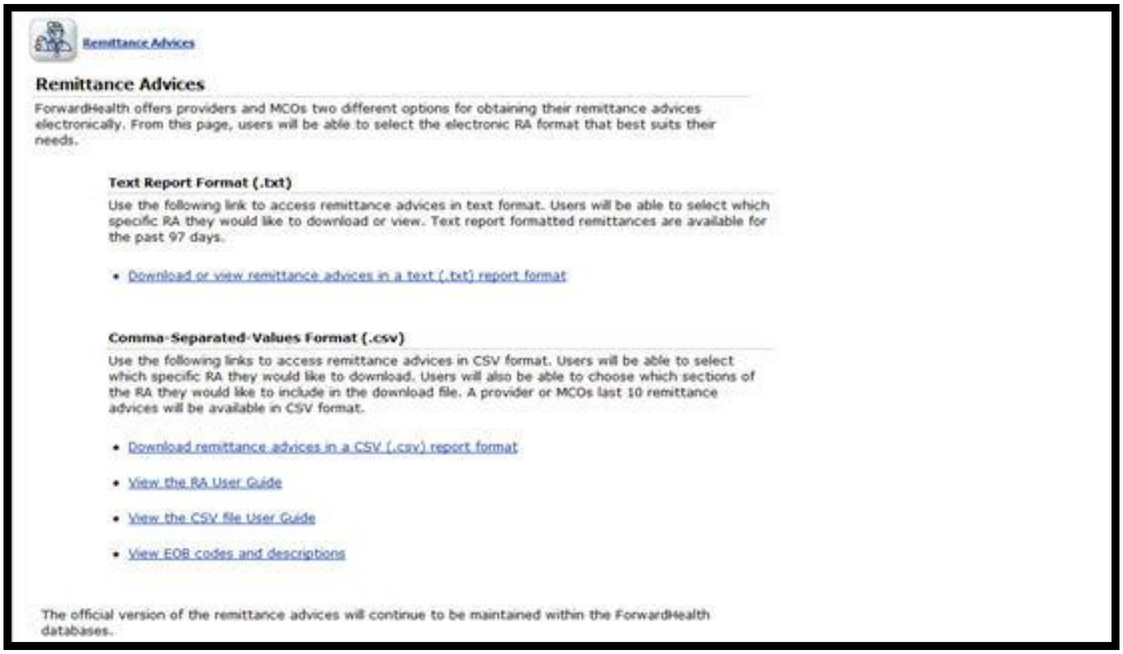

*Secure Portal Home Page*

4. Click **Remittance Advices** on the main menu.

   Only the account administrator and clerks who are assigned the Remittance Advice role will see this option on the main menu and be able to access RAs on the Portal. See Section 2 in this user guide for instructions on assigning a clerk the Remittance Advice role.


*Remittance Advices Link*

The Remittance Advices page will be displayed.




*Remittance Advices Page*

The Remittance Advices page contains links that allow you to view and download your RAs in the Text Report (.txt) and/or Comma-Separated-Values (.csv) formats.

The page also provides links to helpful tools on how to use the RA functionality.

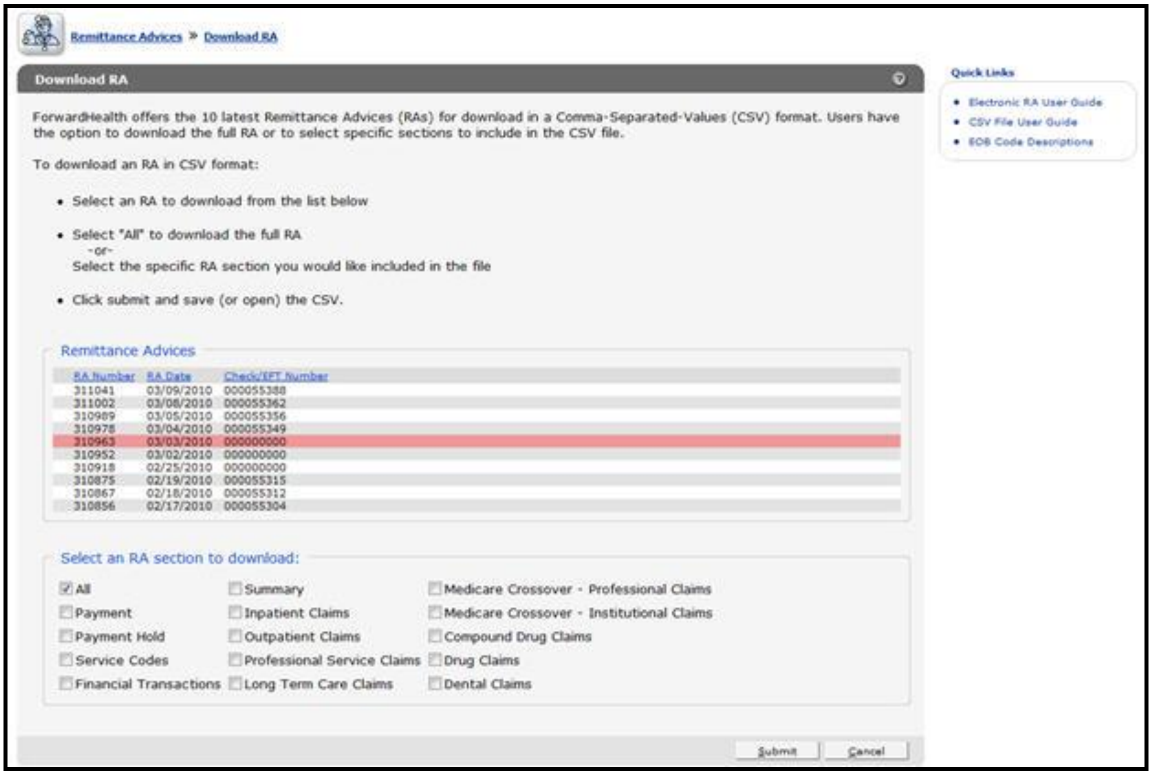
- **Download or view remittance advices in a text (.txt) report format** – allows users to view or download text copies of RAs for the past 97 days.
- **Download remittance advices in a CSV (.csv) report format** – allows users to download their ten most recent RAs in a CSV file.
- **View the RA User Guide** – access basic information on how to use the RA functionality on the ForwardHealth portal.
- **View the CSV File User Guide** – provides basic information on how to use the CSV file containing your RA information. CSV is a file format accepted by a wide range of computer software programs, including spreadsheet programs such as Microsoft ® Office Excel (Excel) and database programs, such as Microsoft® Office Access.
- **View EOB codes and descriptions** - explanation of benefit (EOB) codes and descriptions. EOB codes and descriptions will be listed in the txt file, however for the CSV file, only the EOB code will be provided. Refer to this link to view the detailed EOB code and corresponding description or meaning.

## 1.2 Download Remittance Advices in a CSV Report Format

To download RAs in a CSV Report Format:

1. In the **Comma-Separated-Values Format (.csv)** section of the Remittance Advice page, click **Download remittance advices in a CSV (.csv) report format**.

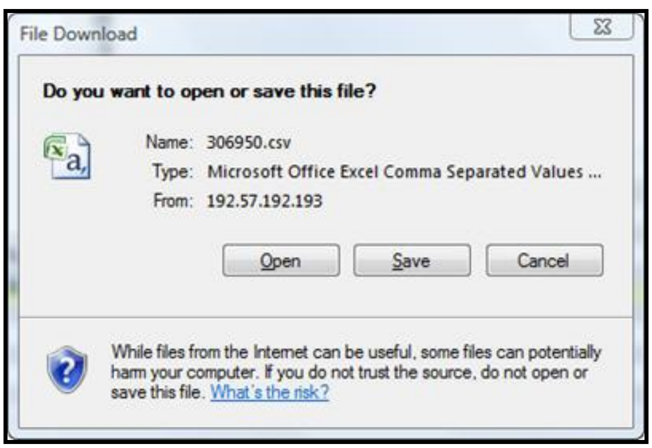
The **Download RA** page will open displaying a list of the provider's last ten RAs.




*Download RA Page*

2. Click anywhere on a line to select an RA.
3. In the **Select an RA section to download** section, the **All** checkbox will be automatically checked by default. This will download the entire RA. To download only selected sections of the RA, uncheck the All box and check one or more individual sections to download.
4. Click **Submit**.

   The file will be processed and the **File Download** window will be displayed.

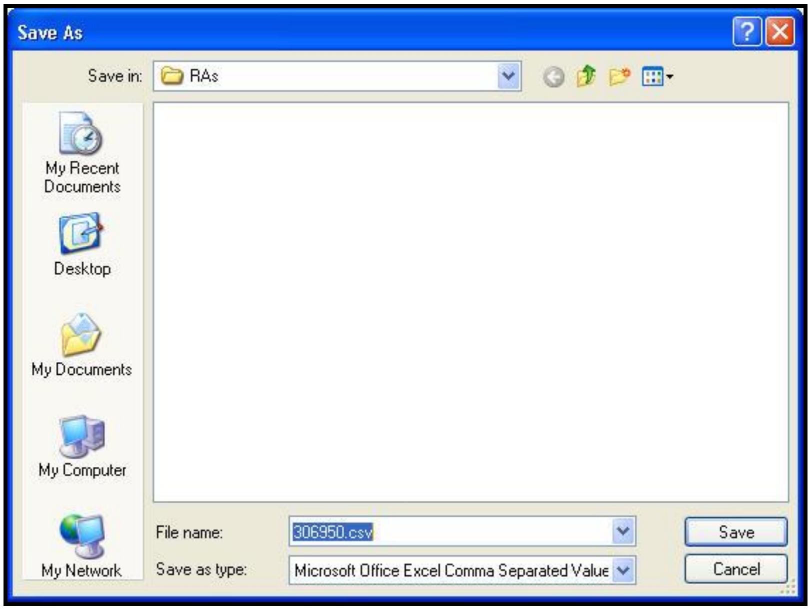



*File Download Window*

**Note:** You must choose to first **Save the file to your desktop** in order to properly download the file and format it as a spreadsheet document.

5. Click **Save**.

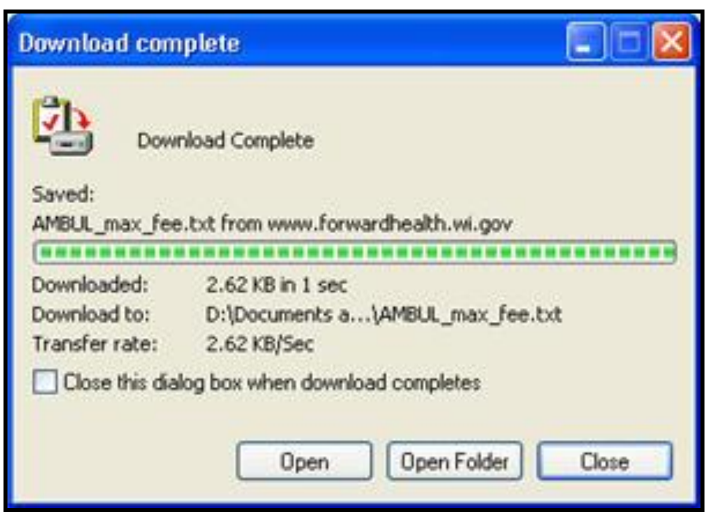
   The **Save As** window will be displayed.




*Save As Window*

6. Browse to the location on your computer or network location where you want to save the file and click **Save**.

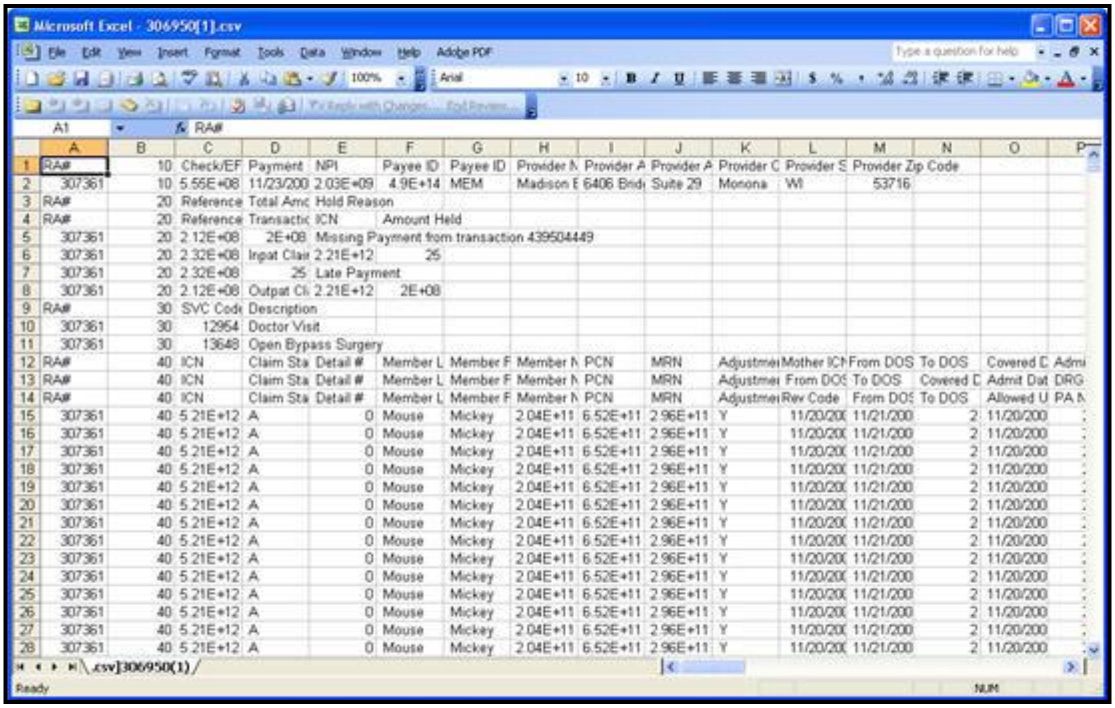
   The file will begin to download. Note that it could take several minutes for the file to download depending on the size of the RA file. Once the file is completely downloaded, the **Download Complete** window will be displayed.




*Download Complete*

7. Click **Open**.

The file that is downloaded is what is known as a Comma Separated Values (CSV) file. A CSV file is a specially formatted plain text file which stores information in a format that can be easily imported into a spreadsheet or database. The downloaded file will open in the default program for opening this type of file on your computer. For the purposes of this user guide, we will be using Microsoft ©Excel.




| | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | RA# | 10 | Check/EF | Payment | NPI | Payee ID | Payee ID | Provider N | Provider A | Provider A | Provider C | Provider S | Provider Zip Code | | | |
| 2 | 307361 | 10 | 5.56E+08 | 11/23/200 | 2.03E+09 | 4.9E+14 | MEM | Madison E | 6406 Brid | Suite 29 | Monona | WI | 53716 | | | |
| 3 | RA# | 20 | Reference | Total Amc | Hold Reason | | | | | | | | | | | |
| 4 | RA# | 20 | Reference | Transactic | ICN | Amount Held | | | | | | | | | | |
| 5 | 307361 | 20 | 2.12E+08 | 2E+08 | Missing Payment from transaction 439504449 | | | | | | | | | | | |
| 6 | 307361 | 20 | 2.32E+08 | Inpat Clai | 2.21E+12 | 25 | | | | | | | | | | |
| 7 | 307361 | 20 | 2.32E+08 | 25 | Late Payment | | | | | | | | | | | |
| 8 | 307361 | 20 | 2.12E+08 | Outpat Cl | 2.21E+12 | 2E+08 | | | | | | | | | | |
| 9 | RA# | 30 | SVC Code | Description | | | | | | | | | | | | |
| 10 | 307361 | 30 | 12954 | Doctor Visit | | | | | | | | | | | | |
| 11 | 307361 | 30 | 13648 | Open Bypass Surgery | | | | | | | | | | | | |
| 12 | RA# | 40 | ICN | Claim Sta | Detail # | Member L | Member F | Member N | PCN | MRN | Adjustmei | Mother ICN | From DOS | To DOS | Covered D | Admi |
| 13 | RA# | 40 | ICN | Claim Sta | Detail # | Member L | Member F | Member N | PCN | MRN | Adjustmei | From DOS | To DOS | Covered D | Admit Dat | DRG |
| 14 | RA# | 40 | ICN | Claim Sta | Detail # | Member L | Member F | Member N | PCN | MRN | Adjustmei | Rev Code | From DOS | To DOS | Allowed U | PA N |
| 15 | 307361 | 40 | 5.21E+12 | A | 0 | Mouse | Mickey | 2.04E+11 | 6.52E+11 | 2.96E+11 | Y | 11/20/200 | 11/21/200 | 2 | 11/20/200 | |
| 16 | 307361 | 40 | 5.21E+12 | A | 0 | Mouse | Mickey | 2.04E+11 | 6.52E+11 | 2.96E+11 | Y | 11/20/200 | 11/21/200 | 2 | 11/20/200 | |
| 17 | 307361 | 40 | 5.21E+12 | A | 0 | Mouse | Mickey | 2.04E+11 | 6.52E+11 | 2.96E+11 | Y | 11/20/200 | 11/21/200 | 2 | 11/20/200 | |
| 18 | 307361 | 40 | 5.21E+12 | A | 0 | Mouse | Mickey | 2.04E+11 | 6.52E+11 | 2.96E+11 | Y | 11/20/200 | 11/21/200 | 2 | 11/20/200 | |
| 19 | 307361 | 40 | 5.21E+12 | A | 0 | Mouse | Mickey | 2.04E+11 | 6.52E+11 | 2.96E+11 | Y | 11/20/200 | 11/21/200 | 2 | 11/20/200 | |
| 20 | 307361 | 40 | 5.21E+12 | A | 0 | Mouse | Mickey | 2.04E+11 | 6.52E+11 | 2.96E+11 | Y | 11/20/200 | 11/21/200 | 2 | 11/20/200 | |
| 21 | 307361 | 40 | 5.21E+12 | A | 0 | Mouse | Mickey | 2.04E+11 | 6.52E+11 | 2.96E+11 | Y | 11/20/200 | 11/21/200 | 2 | 11/20/200 | |
| 22 | 307361 | 40 | 5.21E+12 | A | 0 | Mouse | Mickey | 2.04E+11 | 6.52E+11 | 2.96E+11 | Y | 11/20/200 | 11/21/200 | 2 | 11/20/200 | |
| 23 | 307361 | 40 | 5.21E+12 | A | 0 | Mouse | Mickey | 2.04E+11 | 6.52E+11 | 2.96E+11 | Y | 11/20/200 | 11/21/200 | 2 | 11/20/200 | |
| 24 | 307361 | 40 | 5.21E+12 | A | 0 | Mouse | Mickey | 2.04E+11 | 6.52E+11 | 2.96E+11 | Y | 11/20/200 | 11/21/200 | 2 | 11/20/200 | |
| 25 | 307361 | 40 | 5.21E+12 | A | 0 | Mouse | Mickey | 2.04E+11 | 6.52E+11 | 2.96E+11 | Y | 11/20/200 | 11/21/200 | 2 | 11/20/200 | |
| 26 | 307361 | 40 | 5.21E+12 | A | 0 | Mouse | Mickey | 2.04E+11 | 6.52E+11 | 2.96E+11 | Y | 11/20/200 | 11/21/200 | 2 | 11/20/200 | |
| 27 | 307361 | 40 | 5.21E+12 | A | 0 | Mouse | Mickey | 2.04E+11 | 6.52E+11 | 2.96E+11 | Y | 11/20/200 | 11/21/200 | 2 | 11/20/200 | |
| 28 | 307361 | 40 | 5.21E+12 | A | 0 | Mouse | Mickey | 2.04E+11 | 6.52E+11 | 2.96E+11 | Y | 11/20/200 | 11/21/200 | 2 | 11/20/200 | |

*CSV File*

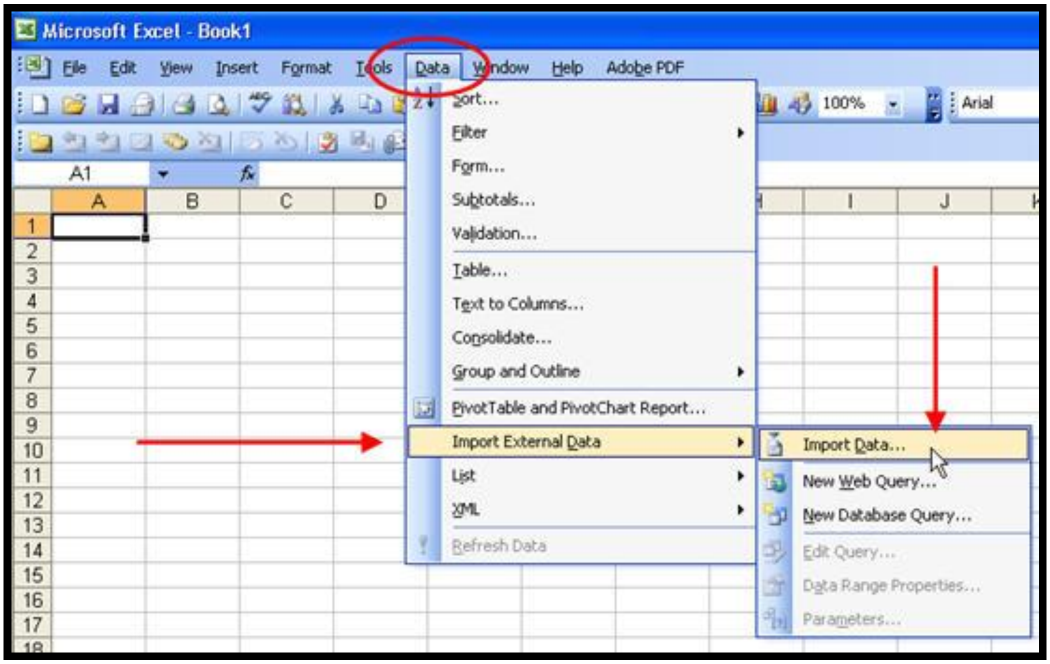
Once you've retrieved the CSV file, immediately save it to disk as a CSV file before making any changes. This will avoid the need to download the original file again should you run into problems afterwards.

The file that is downloaded is just an unformatted CSV file. In order for the file to be properly read and formatted, it must be imported into a spreadsheet or database file.

## *1.2.1 Importing the CSV File to a Spreadsheet*

To import the CSV file into a spreadsheet:

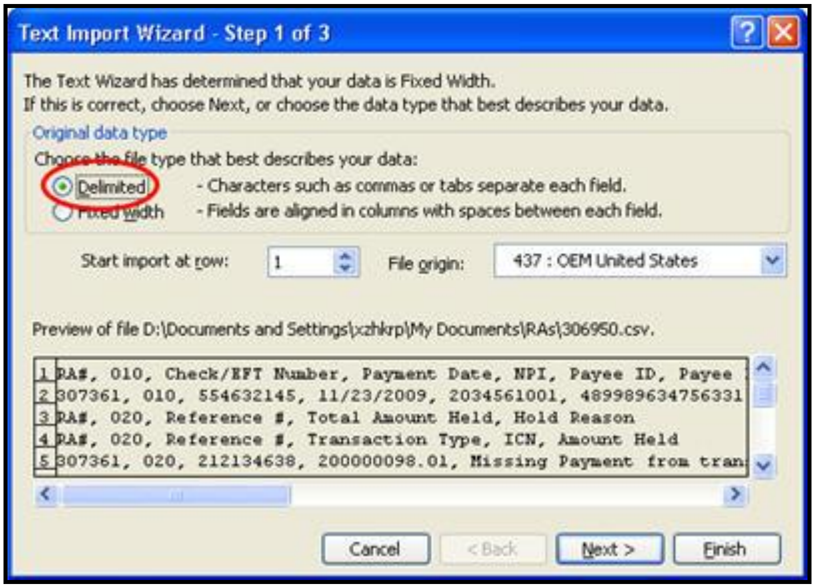
1. Open a blank Excel spreadsheet.




*Blank Spreadsheet*

2. From the main menu at the top of the page, click **Data**.
3. From the drop-down menu that opens, select **Import External Data>Import Data**.

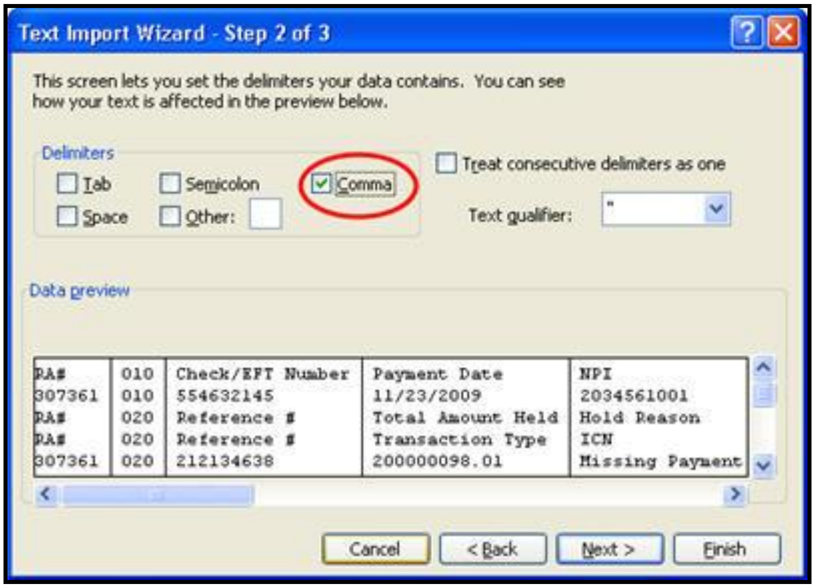
   The Text Import wizard will be displayed.




*Text Import Wizard Step 1*

4. In the **Original data type** section, click **Delimited**.
5. Click **Next**.

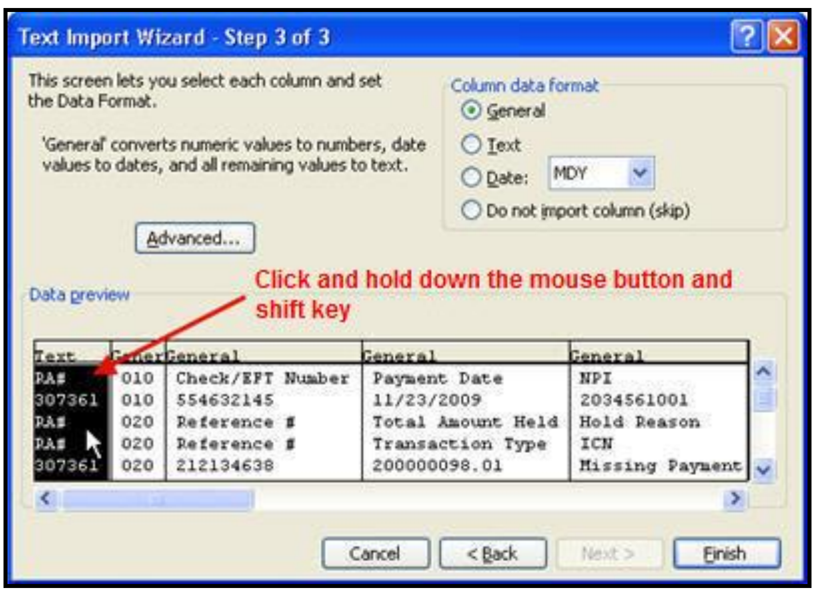
   Step 2 of the wizard will be displayed.




*Text Import Wizard Step 2*

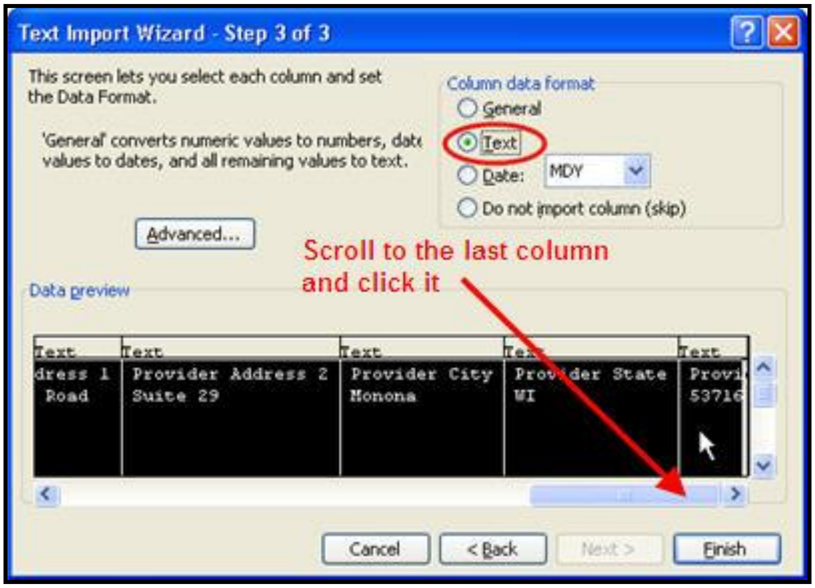
6. Check the **Comma** box and make certain that no other boxes are checked.
7. Click **Next**.

   Step 3 of the Text Import Wizard will be displayed.




*Text Import Wizard Step 3*

8. Click in the first column and hold down the left mouse button and the **shift** key.



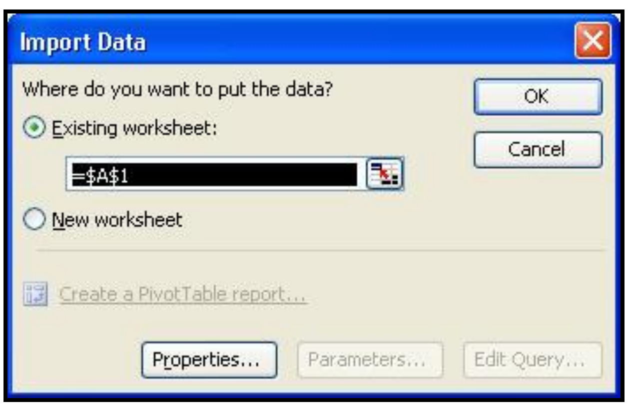

9. Use the horizontal scroll bar to scroll to the far right and click in the last column.

   All the columns should now be selected (highlighted).

10. In the **Column data format** section at the top right of the wizard, click **Text**.

11. Click **Finish**.

    The Import Data window will be displayed.

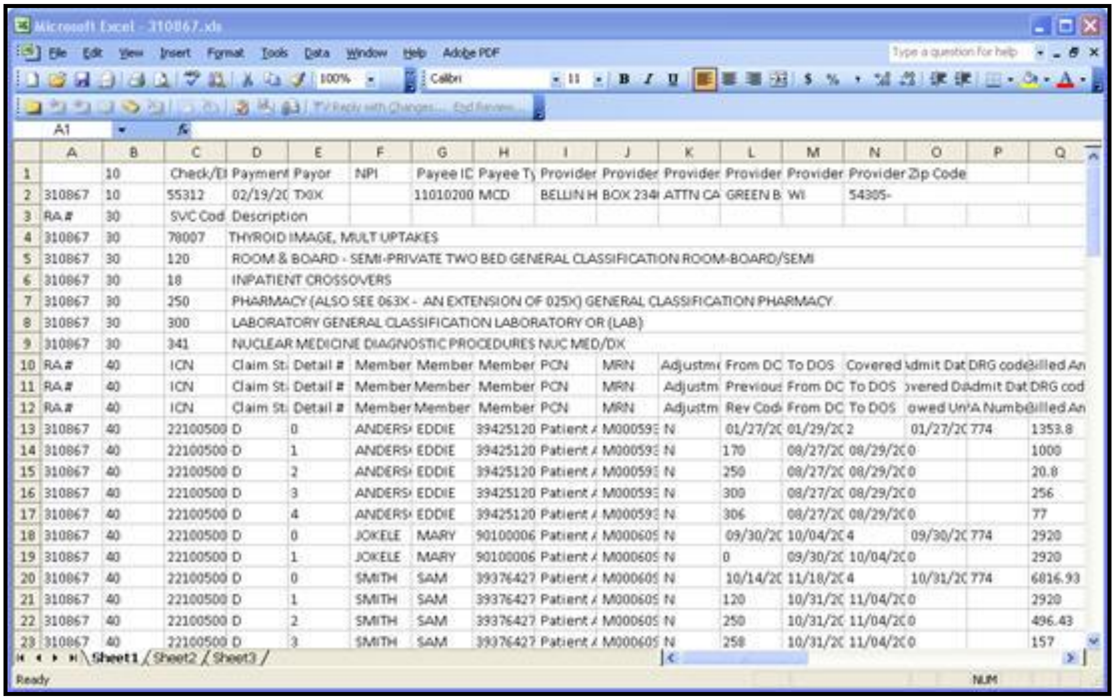



*Import Data Window*

12. Choose if you want to put the data into a new or existing worksheet.

13. Click **OK**.

    The spreadsheet will populate with the RA information. You can now sort or manipulate the data as needed.




*RA Spreadsheet*

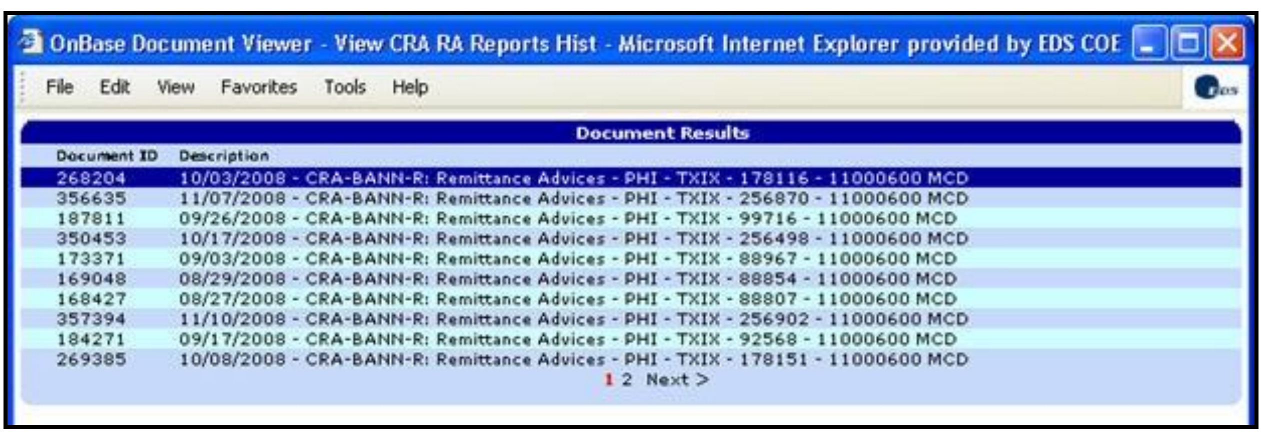
For information on reading the imported file, please refer to the CSV File User Guide located on the Remittance Advices page on the ForwardHealth Portal.

## 1.3 View Remittance Advices

Users can view text copies of their RAs for the past 97 days using the link in the **Text Report Format (.txt)** section of the Remittance Advice page.

1. To view the most recent RAs for the logged in provider ID, click **Download or view remittance advices in a text (.txt) report format**.

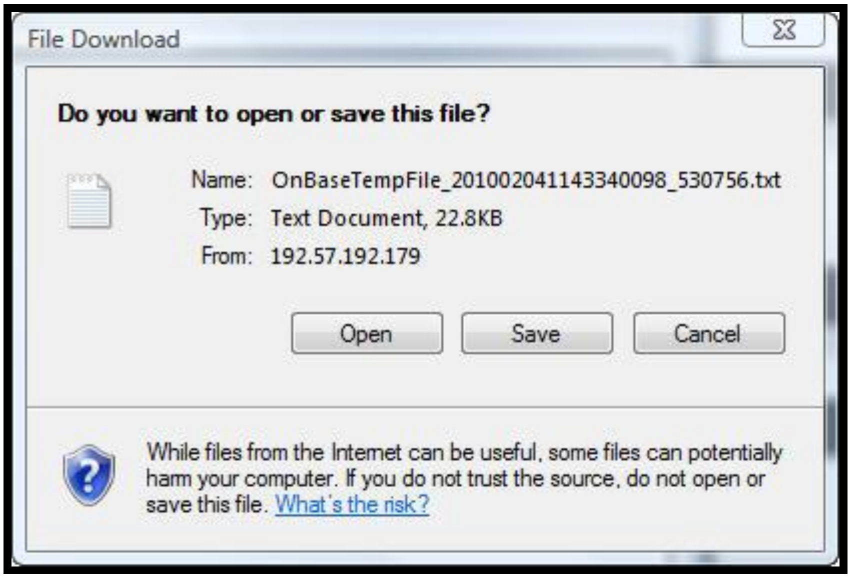
   The OnBase document viewer will be displayed in a separate browser window showing the most recent RAs.




*Document Results Panel*

2. Click the RA you wish to view.

The **File Download** window will be displayed.

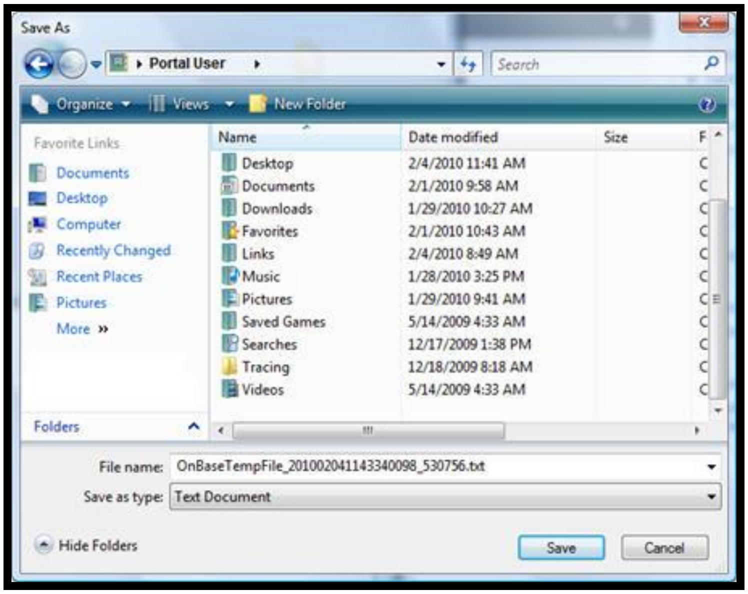



*File Download Window*

3. You can choose whether to open the RA or save it to you computer or network location.
   - Click **Open** if you wish to just view the RA.

     The RA will be displayed in a separate window (see the RA Text Report screenshot below).
   - Click **Save** if you wish to save the RA.

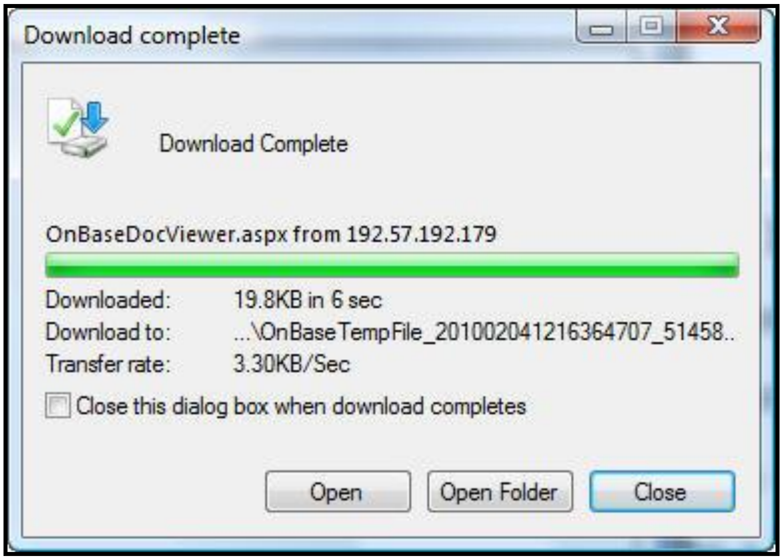
     The **Save As** window will be displayed.




*Save As Window*

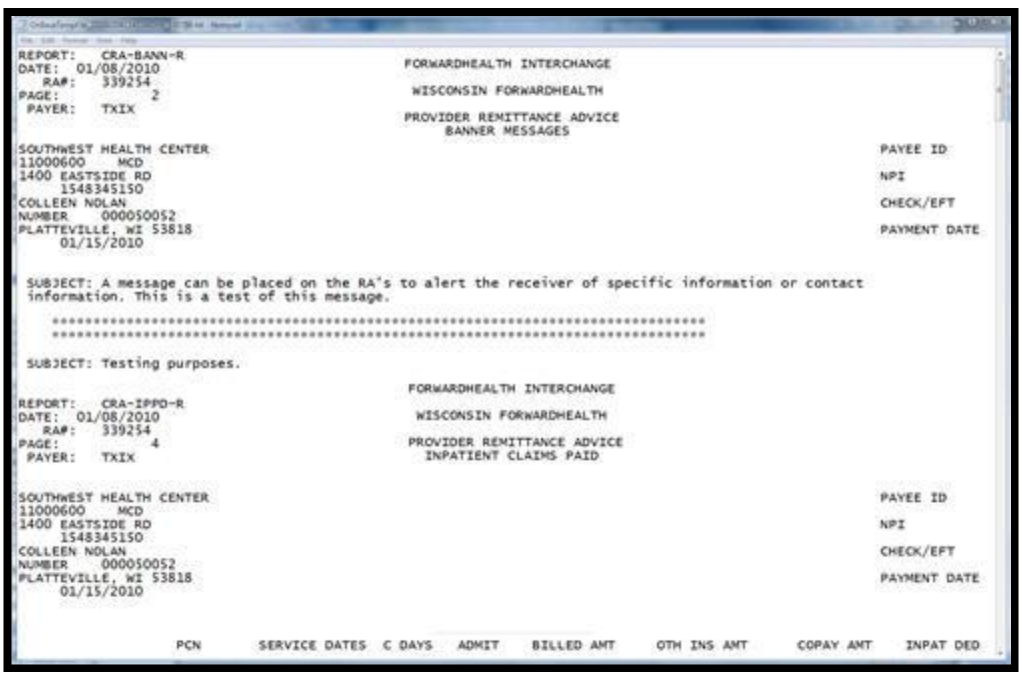
4. Browse to a location on your computer or network where you wish to save the RA and click **Save**.

The **Download complete** window will be displayed.




5. Click **Open** to view the RA.

   The RA text report will be displayed in a separate window.



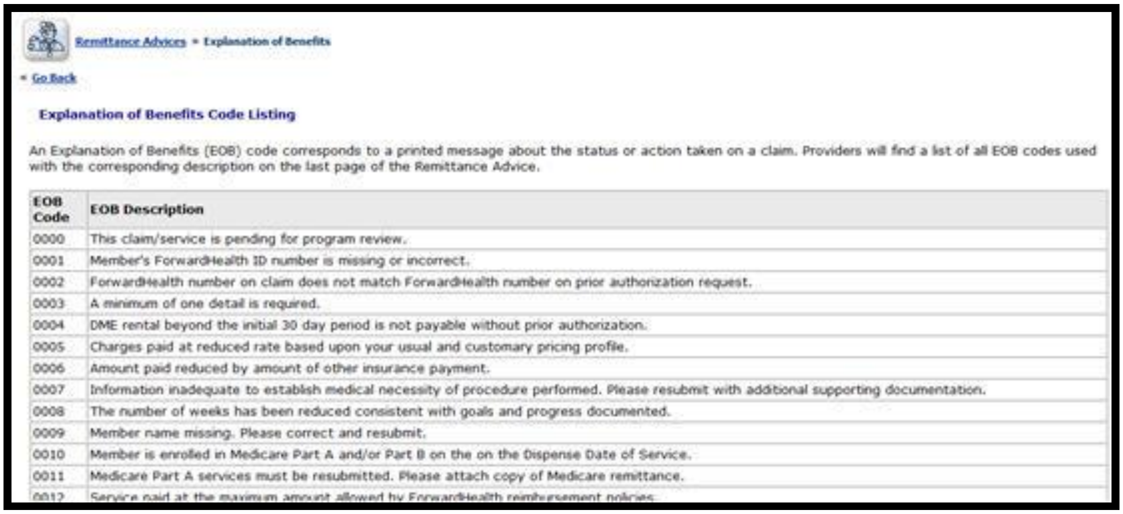

*RA Text Report*

## 1.4 View EOB codes and Descriptions

To view **Explanation of Benefits (EOB)** codes and descriptions:

1. Click the **View EOB codes and descriptions** link at the bottom of the **Remittance Advices** page.

The **Explanation of Benefits Code Listing** page will be displayed.


Remittance Advices » Explanation of Benefits

« Go Back

**Explanation of Benefits Code Listing**

An Explanation of Benefits (EOB) code corresponds to a printed message about the status or action taken on a claim. Providers will find a list of all EOB codes used with the corresponding description on the last page of the Remittance Advice.

| EOB Code | EOB Description |
|---|---|
| 0000 | This claim/service is pending for program review. |
| 0001 | Member's ForwardHealth ID number is missing or incorrect. |
| 0002 | ForwardHealth number on claim does not match ForwardHealth number on prior authorization request. |
| 0003 | A minimum of one detail is required. |
| 0004 | DME rental beyond the initial 30 day period is not payable without prior authorization. |
| 0005 | Charges paid at reduced rate based upon your usual and customary pricing profile. |
| 0006 | Amount paid reduced by amount of other insurance payment. |
| 0007 | Information inadequate to establish medical necessity of procedure performed. Please resubmit with additional supporting documentation. |
| 0008 | The number of weeks has been reduced consistent with goals and progress documented. |
| 0009 | Member name missing. Please correct and resubmit. |
| 0010 | Member is enrolled in Medicare Part A and/or Part B on the on the Dispense Date of Service. |
| 0011 | Medicare Part A services must be resubmitted. Please attach copy of Medicare remittance. |
| 0012 | Service paid at the maximum amount allowed by ForwardHealth reimbursement policies. |

*Explanation of Benefits Code Listing Page*

2. Scroll down the view to view the desired EOB.

# 2 Assigning the Remittance Advice Role to a Clerk

In order for a clerk to view or download RAs, the clerk must be assigned the Remittance Advice role. Only an administrator or a clerk administrator with the RA role can assign the RA role to a clerk.

To assign an RA role to a clerk:

1. From the main menu at the top of the page, click **Account**.

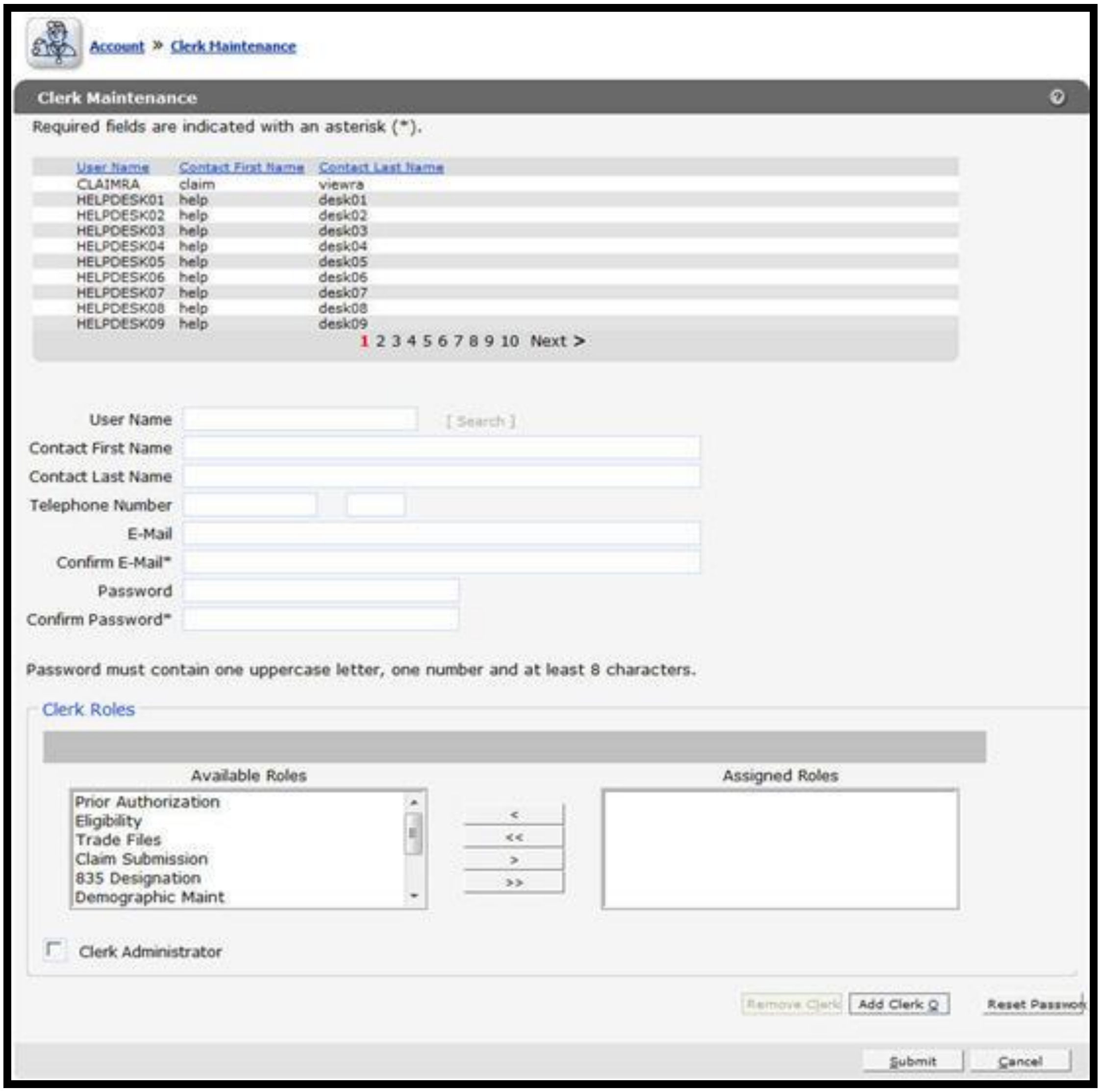

*Secure Site Home Page*

The Account Home page will be displayed.


*Account Home Page*

2. In the **What would you like to do?** section, click **Clerk Maintenance**.

   The Clerk Maintenance Panel will be displayed.



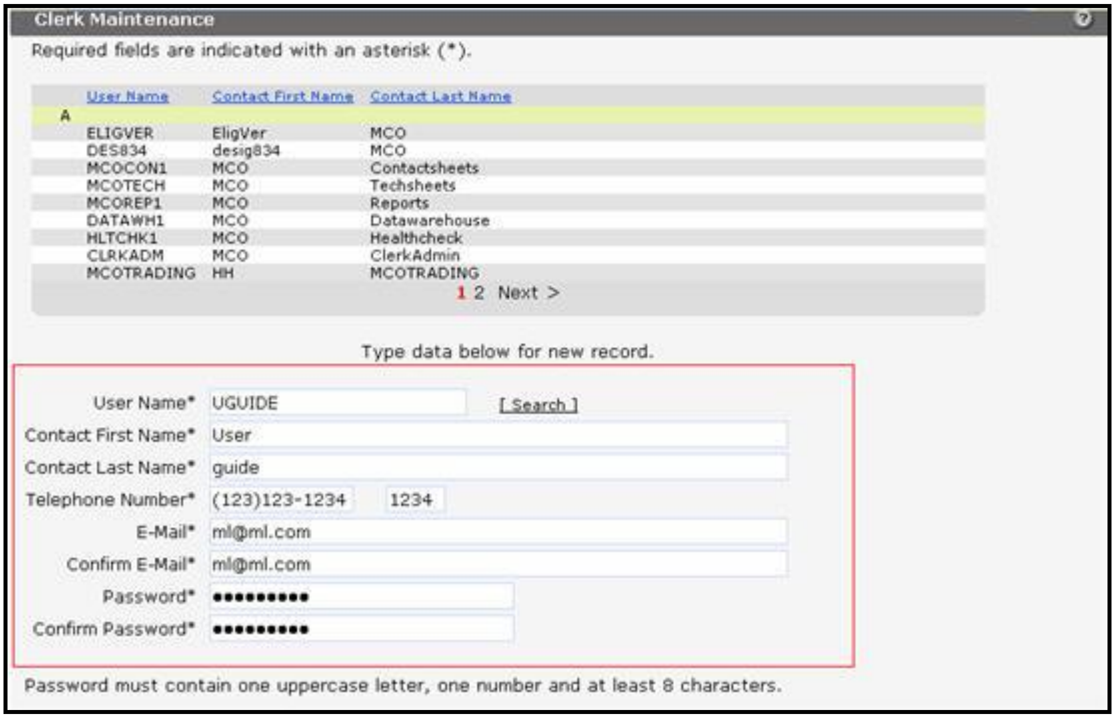

From the Clerk Maintenance Panel, you can either add a new clerk and assign the clerk the RA role, or you can assign the RA role to an existing clerk.

## 2.1 Add a Clerk

**Note:** Only Account Administrators or existing Clerk Administrators may add a new clerk.

1. On the Clerk Maintenance Panel, click the **Add Clerk** button, located near the bottom right corner of the panel.

   The panel refreshes, displaying a new yellow row marked with an **A** as shown below. This row serves as a placeholder for the new entry.




2. Choose a **User Name** and enter it in the space provided.
3. Enter the new clerk's **First Name** and **Last Name** in the spaces provided.
4. Enter the new clerk's **Telephone Number** and extension (if applicable) in the spaces provided.
5. Enter the new clerk's **E-Mail address** (twice for confirmation) in the spaces provided. Select an initial **Password** for the new clerk and enter it twice for confirmation in the spaces provided. (The password may be changed later by the individual.)

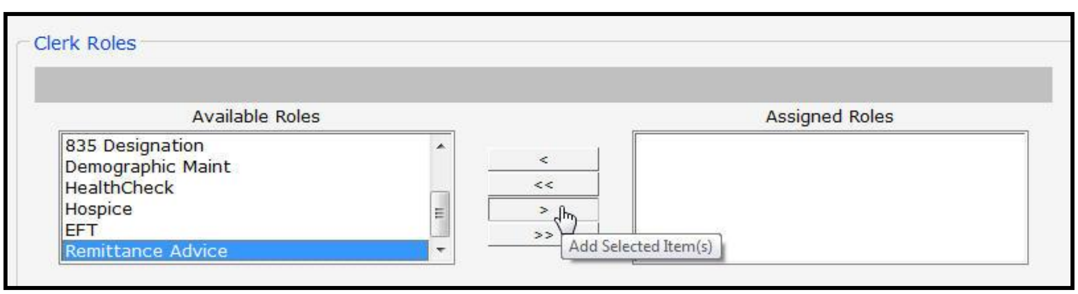
**Note:** The Password MUST contain at least one uppercase letter and one number.

## 2.2 Add the Remittance Advice Role to a Clerk

**Note:** Only Account Administrators or existing Clerk Administrator with the RA role may assign the RA role to a clerk.

To add the Remittance Advice role to a new or existing clerk.

1. Scroll down to the **Clerk Roles** section of the Clerk Maintenance panel and select Remittance Advice from the available roles.



*Clerk Roles Section*

2. Click the **>** arrow.

   The Remittance Advice role will be added to the clerk’s assigned roles.


3. Click **Submit** at the bottom of the panel.

   If the save was successful, a confirmation message will be displayed at the top of the panel.


   If there are any problems with the save, an error message will display here instead.